README for the Reproducibility Package for Concentration of critical mining assets and the geoeconomic fragmentation

Hugo Lapeyronie, Etienne Espagne, Gregor Semeniuk

Overview

The code in this replication package constructs the analysis file from five data sources: S&P et al. (2023), Global Trade Alert (2024), Geopolical Distance, Trade codes, and IEA (2024), using Python. A single main file runs all the code necessary to process the data for the 18 figures and 3 tables in the paper. Replicators should expect the code to run for approximately 2 hours. To decrease computation time, the construction of the GPD dataset may be commented out (in Module_GPD.py). This will decrease the computation time to 10 minutes.

Due to the proprietary nature of the S&P dataset, replicators must possess an S&P license to run the code, as the data cannot be provided. On the S&P platform, data have been collected through the screener tab by selecting all the minerals mentioned in the paper.

Data Availability and Provenance Statements

Statement about Rights

- ☒ I certify that the author(s) of the manuscript have legitimate access to and permission to use the data used in this manuscript.
- ☐ I certify that the author(s) of the manuscript have documented permission to redistribute/publish the data contained within this replication package. Appropriate permission are documented in the LICENSE.txt file.

Summary of Availability

- ☐ All data **are** publicly available.
- ☒ Some data **cannot be made** publicly available.
- ☐ **No data can be made** publicly available.

See overview section for more info.

Details on each Data Source

Data.Name	Data.Files	Location	Provided	Citation	URL	Date of access	Comments
"Global Trade Alert 2024"	GTA+ Database+ 2008-latest. Rdata	Dataset/ GTA	TRUE	GTA, 2024	https:// www.old. global trade alert.org/ data_extraction	July, 2024	The data was collected on a version of the website that does not exist anymore. Users can download the data using the new website: https:// globaltradealert.org /data-center

Data.Name	Data.Files	Location	Provided	Citation	URL	Date of access	Comments
"Geopolical Distance"	UNVotes_ new.RData	Dataset/ Geopolical Distance/	TRUE	GPD, 2024	https:// dataverse. har-vard.edu/ dataset.xhtml? persisten-tId=hdl:1902.1/ 12379&ver-sion=32.0	July, 2024	The file on the dataverse website to download is UNVotes.RData
"IEA policies"	iea_ poli-cies.json	Dataset/	TRUE	IEA, 2024	https:// www.iea.org/ data-and-statistics/ data-tools/ critical-minerals-policy-tracker	July, 2024	The data was obtained from the data URL and saved in a JSON file via web scraping. We collected data on all the policies listed (blue dots on the data URL) on the date of access.
"Trade codes"	Trade_ codes_ HS.xlsx	Dataset/ Trade Codes	TRUE	NA	https:// publica-tions.jrc. ec.europa.eu/ reposi-tory/handle/ JRC136041	July, 2024	All the data were extracted manually from that PDF.
"S&P"	Not available	Dataset/	FALSE	S&P (2023)	https:// www.sp global.com/ market-intelli-gence/ en/campaigns/ metals-mining	November, 2023	

Data files of data source "S&P"

File location	Provided	Date of access
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Dataset/S&P/Company_country/company_master_file_ISO.csv	FALSE	November, 2023
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Dataset/S&P/HHI_reserves_geo_project/Chromium.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Cobalt.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Copper.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Diamonds.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Gold.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Graphite.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Iron.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Lanthanides.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Lanthanum.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Lead.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Lithium.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Manganese.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Nickel.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Palladium.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Phosphate.xlsx	FALSE	November, 2023

File location	Provided	Date of access
Dataset/S&P/HHI_reserves_geo_project/Platinum.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Silver.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Tin.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Tungsten.xlsx	FALSE	November, 2023
Dataset/S&P/HHI_reserves_geo_project/Zinc.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Alloy_mines_ownership_part1.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Alloy_mines_ownership_part2.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Bauxite-alu_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Chrome_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Coal_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Cobalt_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Copper_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Diamants_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Gold.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Graphite_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Iron_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Lead_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Lithium_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Manganese_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Molybnenum_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Nickel_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Pala-plat_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Phosphate-Potash_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/REE_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Silver_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Tin_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Tungsten_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Uranium_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/mergedup10/Zinc_mines_ownership.xls.xlsx.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Antimony.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Bauxite.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Chromite.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Coal.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Cobalt.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Copper.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Diamonds.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Ferrovanadium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Gold.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Graphite.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Iron.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Lanthanides.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Lanthanum.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Lead.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Lithium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Manganese.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Nickel.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Niobium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Palladium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Phosphate.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Platinum.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Scandium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Silver.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Tantalum.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Tin.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Titanium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Tungsten.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Uranium.xlsx	FALSE	November, 2023

File location	Provided	Date of access
Dataset/S&P/Production_clean/Vanadium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Yttrium.xlsx	FALSE	November, 2023
Dataset/S&P/Production_clean/Zinc.xlsx	FALSE	November, 2023
Dataset/S&P/Projects/prodandreserve_proj-clean.csv	FALSE	November, 2023
Dataset/S&P/Projects/prodandreserve_proj-clean.xlsx	FALSE	November, 2023
Dataset/S&P/Projects/prodandreserve_proj.csv	FALSE	November, 2023
Dataset/S&P/Projects/project_id.csv	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Bauxite.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Chromium.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Cobalt.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Copper.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Diamonds.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Gold.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Graphite.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Iron.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Lanthanides.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Lanthanum.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Lead.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Lithium.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Manganese.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Nickel.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Palladium.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Phosphate.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Platinum.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Silver.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Tin.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Tungsten.xlsx	FALSE	November, 2023
Dataset/S&P/Reserves_clean/Zinc.xlsx	FALSE	November, 2023

Software Requirements

- Python 3.12.5
    - `pandas` 2.2.2
    - `numpy` 1.26.4
    - `plotly` 5.21.0
    - `pycountry` 23.12.11
    - `pyreadr` 0.5.2
    - `matplotlib` 3.8.4
    - `altair` 5.5.0
    - `sklearn` 1.4.2

Summary

Approximate time needed to reproduce the analyses on a standard (CURRENT YEAR) desktop machine:

- ☐ <10 minutes
- ☐ 10-60 minutes
- ☒ 1-2 hours
- ☐ 2-8 hours
- ☐ 8-24 hours
- ☐ 1-3 days
- ☐ 3-14 days
- ☐ > 14 days

Approximate storage space needed:

☐ < 25 MBytes

☒ 25 MB - 250 MB

☐ 250 MB - 2 GB

☐ 2 GB - 25 GB

☐ 25 GB - 250 GB

☐ > 250 GB

☐ Not feasible to run on a desktop machine, as described below.

Details

The code was last run on a **8-core AMD-based Desktop with Windows 10**.

Computation took **two hours**.

Description of programs/code

- Programs in `Code_articleBM` will generate all tables and figures in the main body of the article. The file `Core.py` will run them all.
- `load_func.py` regroups the main functions used

Instructions to Replicators

- Edit `Core.py` to adjust the default path
- Run `Core.py` to run all modules in sequence.

Details

- `Core.py`: is used to set paths, to define parameters and process raw data. When run, it also run all modules below in sequence.
- `load_func.py`: Contains all important functions for data procession and the analysis.
- `Module_statistics.py`: Produces the statistics figures.
- `Module_production.py`: Computes HHI for production and produces the HHI production figures.
- `Module_reserves.py`: Computes HHI for reserves and produces the HHI reserves figures.
- `Module_GPD.py`: Process the GPD data and produces GPD related figures.
- `Module_other_figures.py`: Produces figures 12a and 12b.
- `Module_alter_measures.py`: Produces figures in the annex.

List of tables and programs

The provided code reproduces:

☐ All numbers provided in text in the paper
☒ All figures and tables in the paper
☐ Selected tables and figures in the paper, as explained and justified below.

Figure/Table #	Program	Output file	Note
Figure 1	Module_statistics.py	Figure1.png	Source: IEA (2024)
Figure 2	Module_statistics.py	Figure2.png	Source: Global Trade Alert (2024)
Figure 4	Module_GPD.py	Figure4.png	Requires S&P data (non publicly available)

Figure/Table #	Program	Output file	Note
Figure 5	Module_statistics.py	Figure5.png	Requires S&P data (non publicly available)
Figure 6	Module_statistics.py	Figure6.png	Requires S&P data (non publicly available)
Figure 7	Module_production.py	Figure7.png	Requires S&P data (non publicly available)
Figure 8	Module_production.py	Figure8.png	Requires S&P data (non publicly available)
Figure 9	Module_production.py	Figure9.png	Requires S&P data (non publicly available)
Figure 10	Module_GPD.py	Figure10.png	Requires S&P data (non publicly available)
Figure 11	Module_GPD.py	Figure11.png	Requires S&P data (non publicly available)
Figure 12.a	Module_other_figures.py	Figure12a.png	Requires S&P data (non publicly available)
Figure 12.b	Module_other_figures.py	Figure12b.png	Requires S&P data (non publicly available)
Figure 13	Module_alter_measures.py	Figure13.png	Requires S&P data (non publicly available)
Figure 14	Module_alter_measures.py	Figure14.png	Requires S&P data (non publicly available)
Figure 15	Module_alter_measures.py	Figure15.png	Requires S&P data (non publicly available)
Figure 16	Module_reserves.py	Figure16.png	Requires S&P data (non publicly available)
Figure 17	Module_reserves.py	Figure17.png	Requires S&P data (non publicly available)
Figure 18	Module_reserves.py	Figure18.png	Requires S&P data (non publicly available)
Table 1	Module_statistics.py	mining_assets.xlsx	Requires S&P data (non publicly available)
Table 2	Module_production.py	table_df_production_combine.xlsx	Requires S&P data (non publicly available)
Table 3	Module_reserves.py	table_df_reserves_combine.xlsx	Requires S&P data (non publicly available)

Acknowledgements